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**MARKET ACCESS SECRETARIAT**
**Global Analysis Report**

# Sector Trend Analysis

# Fish and Seafood Trends In China

**March 2017**

## REPORT CONTENT SUMMARY

This report looks to highlight the fish and seafood imports into China, and attempts to identify the best opportunities for Canadian exports.

Specifically, the data analysis that follows focusses on the top Chinese fish and seafood imports, of which Canada may be a supplier. It identifies the gap between China's imports from the world and the proportion provided by Canada, and then outlines top international competitors.

Unless otherwise specified, all figures in this document are based on import data as reported by China Customs, and were sourced from Global Trade Tracker (2016).

## CHINA MARKET SUMMARY

The volume of fish and seafood retail sales in China grew by 4% to reach 38 million tonnes in 2015, and was expected to continue growing at a compound annual growth rate (CAGR) of 4% from 2015 to 2020, to reach 47 million tonnes by 2020.

Organic fish and seafood is increasing in popularity among Chinese consumers. Most Chinese consumers prefer natural and imported products because of their enhanced quality.

Canadian fish and seafood e-commerce retailers are expected to reach over 400 million Chinese consumers through the e-commerce pavilion established between Chinese online retailing giant Alibaba and Canada in 2016. In addition, Alibaba has partnered with the Canadian Trade Commissioner Service in China (TCS) to better facilitate goods and services between the two countries. The company and TCS agreed to help connect Canadian businesses, especially small and medium-sized enterprises (SMEs), with the Chinese e-commerce market.

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## RELATED REPORTS

- Market Overview – China
- An Overview of E-Commerce Trends in China
- Foodservice Profile: China
- Competitive Trade Analysis – Fresh, Frozen and Processed Fish in China
- Competitive Trade Analysis – Fresh, Frozen and Processed Crustaceans in China

## CANADA'S PERFORMANCE

**China's Top Ten Suppliers of Fish and Seafood, C$**

| Country | | 2010 | 2013 | 2014 | 2015 | CAGR*(%) 2010-2015 |
|---|---|---|---|---|---|---|
| **Worldwide** | | **6,596,956,221** | **8,663,469,383** | **9,907,680,098** | **11,247,988,370** | **11.3** |
| 1 | Russia | 1,403,142,921 | 1,534,999,018 | 1,561,243,001 | 1,674,553,310 | 3.6 |
| 2 | United States | 877,008,116 | 1,326,639,934 | 1,519,828,719 | 1,637,081,484 | 13.3 |
| 3 | Peru | 1,122,577,490 | 1,050,321,995 | 1,153,293,055 | 1,510,371,006 | 6.1 |
| 4 | Canada | 225,784,045 | 419,390,006 | 514,776,966 | 715,834,935 | 26.0 |
| 5 | Indonesia | 161,976,804 | 378,765,091 | 463,550,352 | 529,818,256 | 26.7 |
| 6 | New Zealand | 134,682,880 | 360,810,417 | 436,149,845 | 510,011,358 | 30.5 |
| 7 | Chile | 353,462,752 | 453,070,470 | 458,080,760 | 449,052,673 | 4.9 |
| 8 | Norway | 424,006,075 | 444,499,215 | 599,225,000 | 448,409,897 | 1.1 |
| 9 | Thailand | 217,170,687 | 249,818,791 | 317,128,314 | 356,995,915 | 10.5 |
| 10 | Japan | 315,586,630 | 224,575,822 | 277,089,352 | 331,004,041 | 1.0 |

* ***CAGR:*** *Compound Annual Growth Rate.*

**China's Top Ten Suppliers of Fish and Seafood, Market Share (%)**

| Country | | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|---|---|---|---|---|---|---|---|
| 1 | Russia | 21.3 | 25.0 | 21.8 | 23.3 | 23.7 | 25.4 |
| 2 | United States | 13.3 | 20.5 | 20.8 | 20.1 | 23.0 | 24.8 |
| 3 | Peru | 17.0 | 19.0 | 17.7 | 15.9 | 17.5 | 22.9 |
| 4 | Canada | 3.4 | 4.7 | 5.3 | 6.4 | 7.8 | 10.9 |
| 5 | Indonesia | 2.5 | 2.9 | 4.0 | 5.7 | 7.0 | 8.0 |
| 6 | New Zealand | 2.0 | 2.9 | 4.2 | 5.5 | 6.6 | 7.7 |
| 7 | Chile | 5.4 | 5.2 | 4.9 | 6.9 | 6.9 | 6.8 |
| 8 | Norway | 6.4 | 6.3 | 6.1 | 6.7 | 9.1 | 6.8 |
| 9 | Thailand | 3.3 | 2.5 | 3.0 | 3.8 | 4.8 | 5.4 |
| 10 | Japan | 4.8 | 2.4 | 2.6 | 3.4 | 4.2 | 5.0 |

**Fish and Seafood Supply Gap, C$**

| | 2010 | 2013 | 2014 | 2015 | CAGR*(%) 2010-2015 |
|---|---|---|---|---|---|
| China's imports from the world | 6,596,956,221 | 8,663,469,383 | 9,907,680,098 | 11,247,988,370 | 11.3 |
| China's imports from Canada | 225,784,045 | 419,390,006 | 514,776,966 | 715,834,935 | 26.0 |
| **Supply gap** | **6,371,172,176** | **8,244,079,377** | **9,392,903,132** | **10,532,153,435** | **10.6** |

* ***CAGR:*** *Compound Annual Growth Rate.*
***Source for all tables:*** *Global Trade Tracker, 2016*

**Top Fish and Seafood Commodity Imports from the World, C$**

| Commodity | Description | Canadian Dollars ($) | | |
|---|---|---|---|---|
| | | 2013 | 2014 | 2015 |
| **Total Fish and Seafood** | | **8,663,469,383** | **9,907,680,098** | **11,247,988,370** |
| 230120 | Flour/meal/pellet of fish, crustaceans, molluscs, etc. unfit for human consumption | 1,725,393,603 | 1,722,614,908 | 2,312,183,574 |
| 030367 | Frozen Alaska pollock | 907,931,277 | 929,033,529 | 935,171,077 |
| 030363 | Frozen cod | 447,294,426 | 556,383,227 | 626,769,871 |
| 030389 | Frozen fish, N.E.S.* | 480,395,226 | 568,297,624 | 576,721,264 |
| 030617 | Frozen shrimp and prawns | 205,308,933 | 330,333,639 | 571,787,113 |
| 030749 | Frozen/dried cuttle fish and squid | 460,978,296 | 495,857,808 | 482,930,962 |
| 030621 | Live rock lobster and other sea crawfish | 392,769,945 | 445,602,651 | 437,368,482 |
| 030312 | Frozen Pacific salmon, exclude Sockeye salmon (red salmon) | 394,618,109 | 443,759,580 | 430,259,961 |
| 030624 | Live, fresh/chilled, dried, salted, or in brine crab | 341,025,114 | 369,285,917 | 417,650,874 |
| 030214 | Fresh Atlantic and Danube salmon | 156,295,772 | 287,929,400 | 393,558,861 |

**N.E.S.: No Elsewhere Specified.*

**China's Top Fish and Seafood Commodity Imports from Canada, C$**

| Commodity | Description | Canadian Dollars ($) | | | Share Over the World's Total Imports (%) | | |
|---|---|---|---|---|---|---|---|
| | | 2013 | 2014 | 2015 | 2013 | 2014 | 2015 |
| **Total Fish and Seafood** | | **419,390,007** | **514,776,964** | **715,834,935** | **4.8** | **5.2** | **6.4** |
| 030616 | Frozen cold-water shrimp and prawns | 83,735,370 | 82,378,574 | 142,051,935 | 56.1 | 50.1 | 56.7 |
| 030622 | Live/chilled lobster | 35,786,022 | 91,682,594 | 130,491,379 | 50.8 | 51.8 | 54.6 |
| 030614 | Frozen crab, including in shell | 84,925,157 | 100,804,677 | 117,395,001 | 51.8 | 57.3 | 53.2 |
| 030624 | Live/chilled crab, including in shell | 64,543,490 | 79,428,912 | 96,627,102 | 18.9 | 21.5 | 23.1 |
| 030214 | Fresh Atlantic and Danube salmon | 1,672,217 | 3,156,720 | 36,990,720 | 1.1 | 1.1 | 9.4 |
| 030389 | Frozen fish, N.E.S.* | 15,255,429 | 12,957,805 | 25,402,212 | 3.2 | 2.3 | 4.4 |
| 030331 | Frozen halibut/Greenland turbot | 6,307,109 | 7,031,576 | 18,687,551 | 5.8 | 7.0 | 12.3 |
| 030366 | Frozen hake | 10,314,918 | 21,089,620 | 15,860,033 | 39.6 | 52.2 | 60.0 |
| 030612 | Frozen lobster, including in shell | 4,618,463 | 9,585,354 | 15,425,042 | 1.2 | 2.2 | 3.6 |
| 030339 | Frozen flat fish (excl. halibut, plaice, sole and turbot) | 8,783,372 | 13,281,325 | 15,220,859 | 3.7 | 5.1 | 6.7 |

**N.E.S.: No Elsewhere Specified.*

***Source for all tables:*** *Global Trade Tracker, 2016.*

According to Euromonitor International, the volume of fish and seafood retail sales in China grew by 4% in 2015, reaching 38 million tonnes. The key drivers of this growth could be consumers' increasing awareness of the benefits of fish and seafood, and powerful sales in inland lower-tier cities. Another possible reason might be Chinese economy's optimisation and diverse food selections which have encouraged Chinese consumers to change their diets from meat oriented to fish and seafood. The increasing internet retailing also boosted the growth of the market in 2015. It was expected that fish and seafood in China could continue to grow by a compound annual growth rate (CAGR) of 4% from 2015 to 2020, to reach 47 million tonnes by 2020.

## TRADE OVERVIEW

### 1. Lobster

**China's Top Lobster Commodity Imports from Canada, C$**

| Commodity | Description | 2013 | 2014 | 2015 |
|---|---|---|---|---|
| **Total Lobster** | | **40,404,485** | **101,267,948** | **145,916,421** |
| 030622 | Live Lobster | 35,786,022 | 91,682,594 | 130,491,379 |
| 030612 | Frozen Lobster | 4,618,463 | 9,585,354 | 15,425,042 |

**China's Top Lobster Commodity Imports from Canada, KG**

| Commodity | Description | 2013 | 2014 | 2015 |
|---|---|---|---|---|
| **Total Lobster** | | **2,268,543** | **5,058,838** | **6,227,507** |
| 030622 | Live Lobster | 1,919,916 | 4,360,758 | 5,056,889 |
| 030612 | Frozen Lobster | 348,627 | 698,080 | 1,170,618 |

*Live Lobster*

**China's Top 10 Suppliers of Live Lobster, C$**

| Country | | 2013 | 2014 | 2015 |
|---|---|---|---|---|
| 1 | Canada | 35,786,022 | 91,682,594 | 130,491,379 |
| 2 | United States | 31,767,300 | 84,473,272 | 107,800,827 |
| 3 | United Kingdom | 25,287 | 659,175 | 476,970 |
| 4 | Kenya | 0 | 0 | 73,158 |
| 5 | Ireland | 483 | 0 | 44,375 |
| 6 | France | 28,737 | 81,163 | 36,480 |
| 7 | Japan | 428 | 24,057 | 28,627 |
| 8 | Taiwan | 683 | 58,625 | 25,152 |
| 9 | New Zealand | 379,843 | 0 | 12,294 |
| 10 | Australia | 158,104 | 0 | 1,292 |

***Source for all tables:*** *Global Trade Tracker, 2016.*

**Live Lobster Supply Gap, C$**

| | 2013 | 2014 | 2015 | CAGR*(%) 2013-15 |
|---|---|---|---|---|
| China's imports from the world | 70,496,910 | 177,080,454 | 238,990,796 | 84 |
| China's imports from Canada | 35,786,022 | 91,682,594 | 130,491,379 | 91 |
| **Supply Gap** | **34,710,888** | **85,397,860** | **108,499,417** | **77** |

***CAGR:** *Compound Annual Growth Rate.*

*Frozen Lobster*

**China's Top 10 Suppliers of Live Lobster, C$**

| | Country | 2013 | 2014 | 2015 |
|---|---|---|---|---|
| 1 | Canada | 4,618,463 | 9,585,354 | 15425,042 |
| 2 | United Kingdom | 0 | 450,248 | 420,139 |
| 3 | New Zealand | 96,957 | 110,052 | 259,381 |
| 4 | Myanmar | 307,887 | 97,979 | 134,540 |
| 5 | France | 50,661 | 0 | 69,364 |
| 6 | Mozambique | 1,596,500 | 220,155 | 23,443 |
| 7 | Malaysia | 0 | 0 | 18,525 |
| 8 | United States | 242,699 | 60,315 | 7,191 |
| 9 | Netherlands | 0 | 0 | 189 |
| 10 | Australia | 9,453 | 6,016 | 0 |

**Frozen Lobster Supply Gap, C$**

| | 2013 | 2014 | 2015 | CAGR*(%) 2013-15 |
|---|---|---|---|---|
| China's imports from the world | 11,995,486 | 10,877,689 | 16,357,814 | 17 |
| China's imports from Canada | 4,618,463 | 9,585,354 | 15,425,042 | 83 |
| **Supply Gap** | **7,377,023** | **1,292,335** | **932,772** | **-64** |

***CAGR:** *Compound Annual Growth Rate.*
***Source for all tables:*** *Global Trade Tracker, 2016.*

## 2. Crab

**China's Top Crab Commodity Imports from Canada, C$**

| Commodity | Description | 2013 | 2014 | 2015 |
|---|---|---|---|---|
| **Total Crab** | | **149,497,343** | **180,233,589** | **214,022,103** |
| 030614 | Frozen crab, including in shell | 84,925,157 | 100,804,677 | 117,395,001 |
| 030624 | Live/chilled crab, including in shell | 64,543,490 | 79,428,912 | 96,627,102 |
| 160510 | Prepared/ preserved cab (excl. smoked) | 28,696 | 0 | 0 |

**China's Top Crab Commodity Imports from Canada, KG**

| Commodity | Description | 2013 | 2014 | 2015 |
|---|---|---|---|---|
| **Total Crab** | | **15,919,745** | **16,497,640** | **14,714,103** |
| 030614 | Frozen crab, including in shell | 11,982,033 | 12,563,124 | 10,700,272 |
| 030624 | Live/chilled crab, including in shell | 3,920,836 | 3,934,516 | 4,013,831 |
| 160510 | Prepared/preserved crab (excl. smoked) | 16,876 | 0 | 0 |

*Frozen Crab*

**China's Top 10 Suppliers of Frozen Crab, C$**

| | Country | 2013 | 2014 | 2015 |
|---|---|---|---|---|
| 1 | Canada | 84,925,157 | 100,804,677 | 117,395,001 |
| 2 | United States | 46,962,995 | 40,663,226 | 49,327,439 |
| 3 | Chile | 11,459,230 | 11,189,452 | 25,203,520 |
| 4 | Russia | 8,727,187 | 5,801,411 | 5,683,712 |
| 5 | United Kingdom | 1,963,890 | 2,649,603 | 5,243,788 |
| 6 | Ireland | 735,508 | 1,627,475 | 2,112,330 |
| 7 | Argentina | 592,733 | 2,439,155 | 1,873,427 |
| 8 | North Korea | 683,570 | 2,072,715 | 1,739,621 |
| 9 | Namibia | 1,171,404 | 2,011,979 | 1,710,022 |
| 10 | Myanmar | 196,640 | 554,381 | 1,662,297 |

***Source for all tables:*** *Global Trade Tracker, 2016*

**Frozen Crab Supply Gap, C$**

| | 2013 | 2014 | 2015 | CAGR*(%) 2013-15 |
|---|---|---|---|---|
| China's imports from the world | 163,966,917 | 175,922,905 | 220,516,753 | 16 |
| China's imports from Canada | 84,925,157 | 100,804,677 | 117,395,001 | 18 |
| **Supply Gap** | **79,041,760** | **75,118,228** | **103,121,752** | **14** |

***CAGR:** *Compound Annual Growth Rate.*

*Fresh Crab*

**China's Top 10 Suppliers of Live Crab, C$**

| | Country | 2013 | 2014 | 2015 |
|---|---|---|---|---|
| 1 | Canada | 64,543,490 | 79,428,912 | 96,627,102 |
| 2 | Bangladesh | 40,831,794 | 44,826,642 | 56,433,045 |
| 3 | United States | 78,426,741 | 66,697,895 | 51,703,451 |
| 4 | North Korea | 15,369,520 | 18,096,040 | 33,198,376 |
| 5 | Russia | 3,557,065 | 6,815,174 | 29,678,677 |
| 6 | Indonesia | 51,320,021 | 52,656,875 | 20,833,413 |
| 7 | Madagascar | 8,772,200 | 19,493,235 | 18,876,398 |
| 8 | Philippines | 10,761,390 | 12,376,094 | 17,606,373 |
| 9 | Pakistan | 11,535,916 | 9,262,133 | 15,541,342 |
| 10 | Malaysia | 46,819 | 13,119 | 14,845,274 |

**Fresh Crab Supply Gap, C$**

| | 2013 | 2014 | 2015 | CAGR*(%) 2013-15 |
|---|---|---|---|---|
| China's imports from the world | 341,025,110 | 369,285,918 | 417,650,874 | 7 |
| China's imports from Canada | 64,543,490 | 79,428,912 | 96,627,102 | 14 |
| **Supply Gap** | **276,481,620** | **289,857,006** | **321,023,772** | **5** |

***CAGR:** *Compound Annual Growth Rate.*
***Source for all tables:*** *Global Trade Tracker, 2016.*

### 3. Shrimp

**China's Top Shrimp Commodity Imports from Canada, C$**

| Commodity | Description | 2013 | 2014 | 2015 |
|---|---|---|---|---|
| **Total Shrimp** | | **92,187,939** | **87,815,084** | **154,308,896** |
| 030616 | Frozen cold-water shrimp and prawns | 83,735,370 | 82,378,574 | 142,051,935 |
| 030617 | Frozen shrimp and prawns | 8,446,966 | 5,418,208 | 12,111,444 |
| 030626 | Fresh cold-water shrimp and prawns | 0 | 18,302 | 108,092 |
| 030627 | Fresh shrimp and prawns, except cold-water | 371 | 0 | 37,425 |
| 030613 | Frozen shrimp and prawns, including in shell | 0 | 0 | 0 |
| 160520 | Prepared/ preserved shrimp and prawns | 0 | 0 | 0 |
| 160521 | Prepared/ preserved shrimp and prawns, not in airtight containers (excl. smoked) | 3,997 | 0 | 0 |
| 160529 | Prepared/ preserved shrimp and prawns, in airtight containers (excl. smoked) | 1,235 | 0 | 0 |

**China's Top Shrimp Commodity Imports from Canada, KG**

| Commodity | Description | 2013 | 2014 | 2015 |
|---|---|---|---|---|
| **Total Shrimp** | | **20,344,505** | **17,237,898** | **22,921,163** |
| 030616 | Frozen cold-water shrimp and prawns | 18,719,685 | 16,924,797 | 22,108,697 |
| 030617 | Frozen shrimp and prawns | 1,624,347 | 312,556 | 808,879 |
| 030626 | Fresh cold-water shrimp and prawns | 0 | 545 | 2,583 |
| 030627 | Fresh shrimp and prawns, except cold-water | 25 | 0 | 1,004 |
| 030613 | Frozen shrimp and prawns, including in shell | 0 | 0 | 0 |
| 160520 | Prepared/ preserved shrimp and prawns | 0 | 0 | 0 |
| 160521 | Prepared/ preserved shrimp and prawns, not in airtight containers (excl. smoked) | 400 | 0 | 0 |
| 160529 | Prepared/ preserved shrimp and prawns, in airtight containers (excl. smoked) | 48 | 0 | 0 |

***Source for all tables:*** *Global Trade Tracker, 2016.*

*Frozen Cold-Water Shrimp and Prawns*

**China's Top 10 Suppliers of Frozen Cold-Water Shrimp and Prawns, C$**

| | Country | 2013 | 2014 | 2015 |
|---|---|---|---|---|
| 1 | Canada | 83,735,370 | 82,378,574 | 142,051,935 |
| 2 | Greenland | 22,543,469 | 22,905,487 | 42,796,916 |
| 3 | Ecuador | 1,965,969 | 8,690,388 | 18,183,195 |
| 4 | Russia | 4,777,714 | 9,840,063 | 12,929,968 |
| 5 | Argentina | 2,824,504 | 6,382,357 | 10,040,559 |
| 6 | Estonia | 4,679,953 | 4,315,751 | 7,724,001 |
| 7 | Denmark | 15,011,264 | 13,534,589 | 7,722,214 |
| 8 | United States | 192,907 | 876,988 | 2,442,348 |
| 9 | India | 0 | 2,078,161 | 2,285,192 |
| 10 | Faroe Islands | 1,611,847 | 1,285,414 | 844,236 |

**Frozen Cold-Water Shrimp and Prawns Supply Gap, C$**

| | 2013 | 2014 | 2015 | CAGR*(%) 2013-15 |
|---|---|---|---|---|
| China's imports from the world | 149,368,352 | 164,496,933 | 250,642,420 | 30 |
| China's imports from Canada | 83,735,370 | 82,378,574 | 142,051,935 | 30 |
| **Supply Gap** | **65,632,982** | **82,118,359** | **108,590,485** | **29** |

***CAGR:** *Compound Annual Growth Rate.*

*Frozen Shrimp and Prawns*

**China's Top 10 Suppliers of Frozen Shrimp and Prawns, C$**

| | Country | 2013 | 2014 | 2015 |
|---|---|---|---|---|
| 1 | Ecuador | 55,390,398 | 147,388,144 | 225,393,173 |
| 2 | Indonesia | 3,342,163 | 18,247,422 | 83,542,455 |
| 3 | India | 48,064,265 | 36,159,840 | 77,253,056 |
| 4 | Argentina | 35,438,543 | 49,729,408 | 67,074,469 |
| 5 | Thailand | 15,248,963 | 22,387,507 | 49,985,470 |
| 6 | Canada | 8,446,966 | 5,418,208 | 12,111,444 |
| 7 | Myanmar | 6,629,769 | 11,448,769 | 11,065,599 |
| 8 | Australia | 3,547,439 | 5,726,218 | 8,326,804 |
| 9 | Pakistan | 1,898,144 | 7,565,520 | 7,711,005 |
| 10 | Mozambique | 5,694,465 | 4,001,249 | 7,646,609 |

***Source for all tables:*** *Global Trade Tracker, 2016.*

**Frozen Shrimp and Prawns Supply Gap, C$**

| | 2013 | 2014 | 2015 | CAGR*(%) 2013-15 |
|---|---|---|---|---|
| China's imports from the world | 205,308,933 | 330,333,638 | 571,787,113 | 67 |
| China's imports from Canada | 8,446,966 | 5,418,208 | 12,111,444 | 20 |
| **Supply Gap** | **196,861,967** | **324,915,430** | **559,675,669** | **69** |

***CAGR:** *Compound Annual Growth Rate.*

4. **Clams**

**China's Top Clam Commodity Imports from Canada, C$**

| Commodity | Description | 2013 | 2014 | 2015 |
|---|---|---|---|---|
| **Total Clams** | | **7,632,556** | **13,455,230** | **27,417,403** |
| 030771 | Live, fresh or chilled clams | 0 | 3,327,436 | 13,452,585 |
| 030779 | Clams, cockles and ark shells | 7,396,039 | 9,871,530 | 13,126,557 |
| 160556 | Prepared/ preserved clams, cockles and ark shells (excl. smoked) | 236,517 | 256,264 | 838,261 |

**China's Top Clam Commodity Imports from Canada, KG**

| Commodity | Description | 2013 | 2014 | 2015 |
|---|---|---|---|---|
| **Total Clams** | | **1,057,199** | **1,506,536** | **1,816,864** |
| 030771 | Live, fresh or chilled clams | 0 | 79,966 | 337,841 |
| 030779 | Clams, cockles and ark shells | 1,038,299 | 1,407,670 | 1,441,223 |
| 160556 | Prepared/ preserved clams, cockles and ark shells (excl. smoked) | 18,900 | 18,900 | 37,800 |

***Source for all tables:*** *Global Trade Tracker, 2016.*

*Live Clams*

**China's Top 10 Suppliers of Live Clam, C$**

| | Country | 2013 | 2014 | 2015 |
|---|---|---|---|---|
| 1 | United States | 10,296 | 8,535,818 | 23,364,056 |
| 2 | Canada | 0 | 3,327,436 | 13,452,585 |
| 3 | Pakistan | 65,212 | 612,363 | 2,161,233 |
| 4 | Ireland | 898,209 | 1,530,117 | 1,838,305 |
| 5 | Myanmar | 107 | 223,837 | 730,390 |
| 6 | North Korea | 166,736 | 321,258 | 638,144 |
| 7 | Thailand | 10,859,094 | 7,849,362 | 270,936 |
| 8 | South Korea | 901,204 | 763,913 | 215,716 |
| 9 | New Zealand | 6,508 | 41,048 | 58,997 |
| 10 | Mexico | 5,261 | 133,865 | 33,543 |

**Live Calm Supply Gap, C$**

| | 2013 | 2014 | 2015 | CAGR*(%) 2013-15 |
|---|---|---|---|---|
| China's imports from the world | 13,021,036 | 23,369,724 | 42,796,881 | 81 |
| China's imports from Canada | 0 | 3,327,436 | 13,452,585 | N/C* |
| **Supply Gap** | **13,021,036** | **20,042,288** | **29,344,296** | **50** |

***N/C:** Not Calculable. ***CAGR:** Compound Annual Growth Rate.*

*Clams, Cockles and Ark Shells*

**China's Top 5 Suppliers of Clams, Cockles and Ark Shells, C$**

| | Country | 2013 | 2014 | 2015 |
|---|---|---|---|---|
| 1 | Canada | 7,396,039 | 9,871,530 | 13,126,557 |
| 2 | Pakistan | 0 | 111,144 | 865,581 |
| 3 | Ireland | 31,996 | 192,688 | 204,864 |
| 4 | India | 122,082 | 109,096 | 83,910 |
| 5 | United States | 1,365 | 3,208 | 28,682 |

***Note:** China has only 8 suppliers of clams, cockles, and ark shells in 2015.*
***Source for all tables:** Global Trade Tracker, 2016.*

**Clams, Cockles and Ark Shells Supply Gap, C$**

| | 2013 | 2014 | 2015 | CAGR*(%) 2013-2015 |
|---|---|---|---|---|
| China's imports from the world | 7,551,482 | 10,296,016 | 14,321,046 | 38 |
| China's imports from Canada | 7,396,039 | 9,871,530 | 13,126,557 | 33 |
| **Supply Gap** | **155,443** | **424,486** | **1,194,489** | **177** |

***CAGR:** *Compound Annual Growth Rate.*

5. **Hake**

**China's Top Hake Commodity Imports from Canada, C$**

| Commodity | Description | 2013 | 2014 | 2015 |
|---|---|---|---|---|
| **Total Hake** | | **10,314,918** | **21,089,620** | **15,860,033** |
| 030366 | Frozen hake | 10,314,918 | 21,089,620 | 15,860,033 |

**China's Top Hake Commodity Imports from Canada, KG**

| Commodity | Description | 2013 | 2014 | 2015 |
|---|---|---|---|---|
| **Total Hake** | | **5,467,460** | **11,690,426** | **10,254,282** |
| 030366 | Frozen hake | 5,467,460 | 11,690,426 | 10,254,282 |

*Frozen Hake*

**China's Top 10 Suppliers of Frozen Hake, C$**

| | Country | 2013 | 2014 | 2015 |
|---|---|---|---|---|
| 1 | Canada | 10,314,918 | 21,089,620 | 15,860,033 |
| 2 | United States | 6,794,839 | 9,494,996 | 2,973,059 |
| 3 | Argentina | 1,933,294 | 3,367,180 | 2,560,749 |
| 4 | New Zealand | 5,076,723 | 2,561,949 | 2,063,568 |
| 5 | Uruguay | 593,538 | 2,038,091 | 777,585 |
| 6 | Russia | 250,778 | 380,353 | 410,729 |
| 7 | Chile | 560,166 | 265,093 | 385,418 |
| 8 | South Africa | 161,853 | 265,843 | 225,655 |
| 9 | Australia | 0 | 0 | 212,398 |
| 10 | South Korea | 244,855 | 619,344 | 180,047 |

***Source for all tables:*** *Global Trade Tracker, 2016.*

**Frozen Hake Supply Gap, C$**

| | 2013 | 2014 | 2015 | CAGR*(%) 2013-15 |
|---|---|---|---|---|
| China's imports from the world | 26,068,964 | 40,436,664 | 26,446,354 | 1 |
| China's imports from Canada | 10,314,918 | 21,089,620 | 15,860,033 | 24 |
| **Supply Gap** | **15,754,046** | **19,347,044** | **10,586,321** | **-18** |

***CAGR:** *Compound Annual Growth Rate.*

## 6. Salmon

**China's Top Salmon Commodity Imports from Canada, C$**

| Commodity | Description | 2013 | 2014 | 2015 |
|---|---|---|---|---|
| **Total Salmon** | | **18,517,546** | **16,396,336** | **41,245,049** |
| 030214 | Fresh Atlantic and Danube salmon | 1,672,217 | 3,156,720 | 36,990,720 |
| 030312 | Frozen Pacific salmon (excl. Sockeye salmon) | 15,668,690 | 9,445,057 | 2,758,812 |
| 030311 | Frozen Sockeye salmon | 0 | 1,317,209 | 844,822 |
| 030319 | Frozen Salmonidae (excl. trout and Pacific, Atlantic and Danube salmon) | 129,993 | 69,912 | 405,913 |
| 030213 | Fresh/ chilled Pacific salmon | 12,097 | 68,096 | 210,249 |
| 030541 | Smoked Pacific, Atlantic And Danube salmon, incl. fillets (excl. offal) | 56,437 | 21,514 | 30,510 |
| 160411 | Prepared/ preserved salmon, whole or pieces | 2,778 | 9,725 | 3,149 |
| 030441 | Fresh/ chilled Pacific, Atlantic, Danube salmon fillet | 0 | 61 | 874 |
| 030219 | Fresh/ chilled Salmonidae (excl. trout and Pacific, Atlantic and Danube salmon) | 28,073 | 0 | 0 |
| 030313 | Frozen Atlantic salmon | 947,261 | 2,123,749 | 0 |
| 030481 | Frozen Pacific, Atlantic And Danube salmon fillets | 0 | 184,293 | 0 |

***Source for all tables:*** *Global Trade Tracker, 2016.*

**China's Top Salmon Commodity Imports from Canada, KG**

| Commodity | Description | 2013 | 2014 | 2015 |
|---|---|---|---|---|
| **Total Salmon** | | **6,550,669** | **3,977,774** | **4,808,608** |
| 030214 | Fresh Atlantic and Danube salmon | 193,954 | 320,471 | 3,757,015 |
| 030312 | Frozen Pacific salmon (excl. Sockeye salmon) | 5,908,823 | 2,966,675 | 781,970 |
| 030311 | Frozen Sockeye salmon | 0 | 166,937 | 130,738 |
| 030319 | Frozen Salmonidae (excl. trout and Pacific, Atlantic and Danube salmon) | 123,188 | 61,949 | 128,664 |
| 030213 | Fresh/ chilled Pacific salmon | 826 | 2,970 | 8,517 |
| 030541 | Smoked Pacific, Atlantic And Danube salmon, incl. fillets (excl. offal) | 1,689 | 424 | 1,536 |
| 160411 | Prepared/ preserved salmon, whole or pieces | 150 | 446 | 141 |
| 030441 | Fresh/ chilled Pacific, Atlantic, Danube salmon fillet | 0 | 6 | 27 |
| 030219 | Fresh/ chilled Salmonidae (excl. trout and Pacific, Atlantic and Danube salmon) | 3,840 | 0 | 0 |
| 030313 | Frozen Atlantic salmon | 199,026 | 399,060 | 0 |
| 030481 | Frozen Pacific, Atlantic And Danube salmon fillets | 119,173 | 58,836 | 0 |

*Fresh Atlantic and Danube Salmon*

**China's Top 5 Suppliers for Fresh Atlantic and Danube Salmon, C$**

| Country | | 2013 | 2014 | 2015 |
|---|---|---|---|---|
| 1 | Faroe Islands | 62,470,973 | 88,322,859 | 143,914,182 |
| 2 | Chile | 7,075,548 | 35,498,357 | 69,862,637 |
| 3 | United Kingdom | 32,387,712 | 61,414,638 | 59,666,495 |
| 4 | Australia | 1,144,169 | 5,143,080 | 49,471,888 |
| 5 | Canada | 1,672,217 | 3,156,720 | 36,990,720 |

***Note:*** *China has only 8 suppliers of fresh Atlantic and Danube salmon in 2015.*
***Source for all tables:*** *Global Trade Tracker, 2016.*

**Fresh Atlantic and Danube Salmon Supply Gap, C$**

| | 2013 | 2014 | 2015 | CAGR*(%) 2013-15 |
|---|---|---|---|---|
| China's imports from the world | 156,295,774 | 287,929,401 | 393,558,862 | 20 |
| China's imports from Canada | 1,672,217 | 3,156,720 | 36,990,720 | 86 |
| **Supply Gap** | **154,623,557** | **284,772,681** | **356,568,142** | **18** |

***CAGR:** *Compound Annual Growth Rate.*

*Frozen Pacific Salmon (exclude Sockeye salmon)*

**China's Top 9 Suppliers for Fresh Pacific Salmon, C$**

| | Country | 2013 | 2014 | 2015 |
|---|---|---|---|---|
| 1 | United States | 184,966,575 | 235,266,170 | 291,293,247 |
| 2 | Russia | 128,318,554 | 94,493,213 | 78,066,578 |
| 3 | Japan | 45,684,622 | 79,477,529 | 38,413,407 |
| 4 | Chile | 17,170,497 | 21,946,712 | 18,616,023 |
| 5 | Canada | 15,668,690 | 9,445,057 | 2,758,812 |
| 6 | Norway | 97,265 | 322,891 | 508,510 |
| 7 | South Korea | 318,665 | 1,222,583 | 257,931 |
| 8 | New Zealand | 0 | 0 | 42,351 |
| 9 | United Kingdom | 0 | 0 | 429 |

***Note:*** *China has 9 suppliers of fresh Pacific Salmon only in 2015.*

**Fresh Atlantic and Danube Salmon Supply Gap, C$**

| | 2013 | 2014 | 2015 | CAGR*(%) 2013-15 |
|---|---|---|---|---|
| China's imports from the world | 394,618,108 | 443,759,581 | 430,259,961 | 4 |
| China's imports from Canada | 15,668,690 | 9,445,057 | 2,758,812 | -58 |
| **Supply Gap** | **378,949,418** | **434,314,524** | **427,501,149** | **6** |

***CAGR:** *Compound Annual Growth Rate.*
***Source for all tables:*** *Global Trade Tracker, 2016.*

## OPPORTUNITIES AND CHALLENGES

**Potential Canadian Commodity Exports to China's Fish and Seafood Market**

| | Commodity | Description |
|---|---|---|
| 1 | 030616 | Frozen cold-water shrimp and prawns |
| 2 | 030622 | Live/chilled lobster |
| 3 | 030779 | Clams, cockles and ark shells |
| 4 | 030624 | Live/ chilled crab, including in shell |
| 5 | 030366 | Frozen Hake |
| 6 | 030771 | Live, fresh or chilled clams |
| 7 | 030612 | Frozen lobster, including in shell |
| 8 | 030214 | Fresh Atlantic and Danube salmon |
| 9 | 030821 | Fresh sea urchins |
| 10 | 030819 | Sea cucumbers |

Above are the top ten potential Canadian commodity exports to the fish and seafood market in China. The prospective of each commodity is based on China's market size for certain products, Canada's market share on such products, and the growing trends in both world and Canada's export markets to China.

Organic fish and seafood is increasing in popularity among Chinese consumers. Most Chinese consumers prefer natural and imported products because of their enhanced quality.

While Canada's exports of fish and seafood commodities in China grew at a compound annual growth rate of 26% from 2010 to 2015, some fish and seafood sectors are still facing a challenging market environment in China.

## E-COMMERCE

China's top internet e-grocers are JD.com, Alibaba, Amazon, Walmart (YIHAODIAN), GOME, Sundan, LVMH, Hisap, and Auchan. JD.com leads the e-grocers and is the largest for computer, communications, and consumer businesses; while Alibaba is the second-top e-grocer, it is by far the largest e-commerce business in China with 56% of all transactions.

As Chinese e-commerce giant Alibaba and Canada launched Tmall Global's country pavilion in September 2016, Canadian fish and seafood e-commerce retailers are expected to reach over 400 million Chinese consumers through this cross-border e-commerce channel. In addition, Alibaba has partnered with the Canadian Trade Commissioner Service in China (TCS) to better facilitate goods and services between the two countries. The company and TCS agreed to help connect Canadian businesses, especially small and medium-sized enterprises (SMEs) with the Chinese e-commerce market. This partnership between Alibaba Group and Canada has created significant opportunities for Canadian business development in China.

According to Planet Retail, mobile internet retailing is booming in China as consumers increasingly use mobile devices to compare prices and make purchases at any time. As a result, internet retailers are targeting the opportunities offered by m-commerce such as developing an e-commerce mobile app. In addition, Chinese consumers are used to fast service and quick delivery of their online purchases. Holding inventory inside the country can help to expedite transactions and meet consumer expectations.

## FOR MORE INFORMATION

International Trade Commissioners can provide Canadian industry with on-the-ground expertise regarding market potential, current conditions and local business contacts, and are an excellent point of contact for export advice.

- **Overview of Trade Commissioner Services in China**
  www.tradecommissioner.gc.ca/cn

- **Find a Trade Commissioner**
  www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp

For additional intelligence on this and other markets, the complete library of Global Analysis reports can be found under *Statistics and Market Information* at the following link, arranged by sector and region of interest:

- ats-sea.agr.gc.ca

For additional information on China Fish and Seafood Expo (CFSE) and Hospitality China 2015 please contact:

- **Ben Berry, Deputy Director**
  Trade Show Strategy and Delivery
  Agriculture and Agri-Food Canada
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## RESOURCES


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SECTOR TREND ANALYSIS, FISH AND SEAFOOD TRENDS in CHINA
*Global Analysis Report*

Prepared by: Mengchao Chen, Co-op Student

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